

# **SiteManager** **Training Manual**



Module A  
Chapter 2

**Contract Administration (+)**  
**Contract Records (+)**  
**Projects**

**Section A-2-3**  
**Viewing Projects**

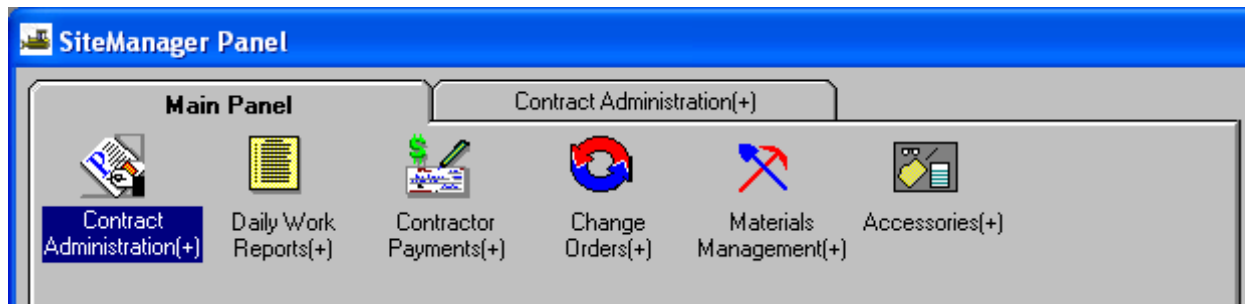
<b>Student's Version</b>
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Indiana Department of Transportation  
August, 2007 Version 3.7b

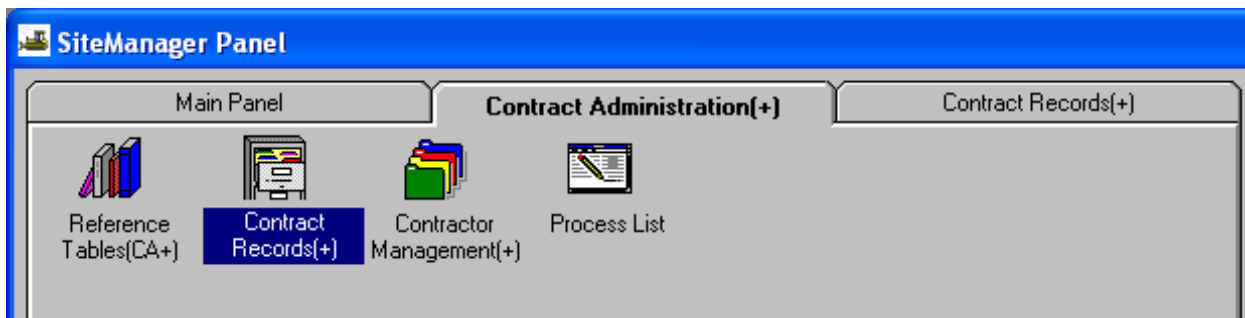
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## Projects

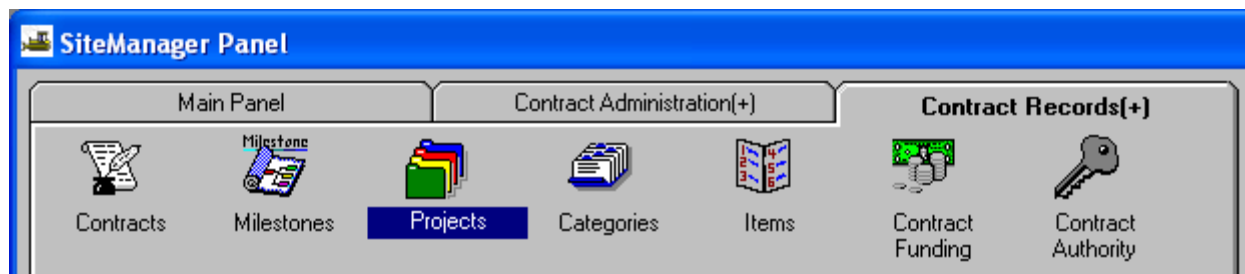
The Projects Window contains descriptions of the Contract's Projects. Every Contract must have at least one Project.



“Double-click” on **Contract Administration (+)** located on the Main Panel.



“Double-click” on **Contract Records (+)**.



“Double-click” on **Projects** icon.

**Select Contract Project**

**Selection**

Contract ID: R -90001


Project Nbr:

Find:

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Location
R -90001	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT 04
R -90002	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT 04
R -90003	99-9999977	STP 3387005	ACTV	C087	660			ON SR 261 AT 04
R -90004	99-9999966	STP 3387005	ACTV	C087	660			ON SR 261 AT 04
R -90005	99-9999955	STP 3387005	PEND	C087	660			ON SR 261 AT 04
R -90006	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT 04

OK Cancel

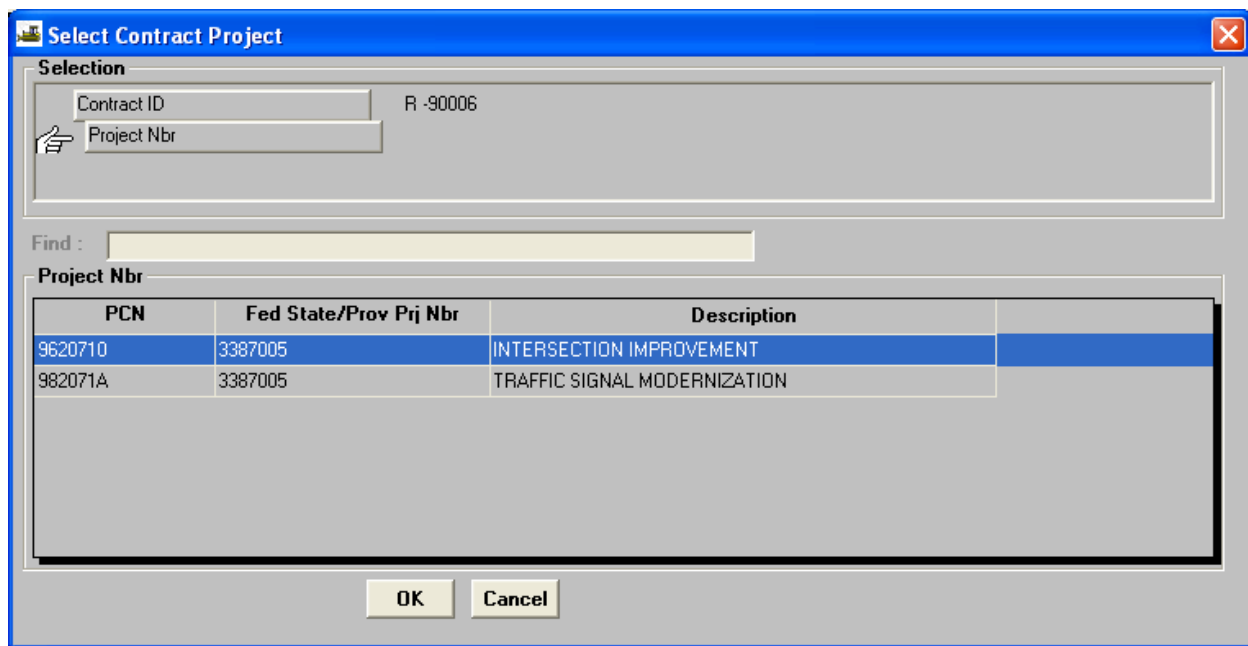
The **Select Contract Project** panel will open:

If the **Select Contract Project** panel does not open then “click” on the **Open**  button on the toolbar.

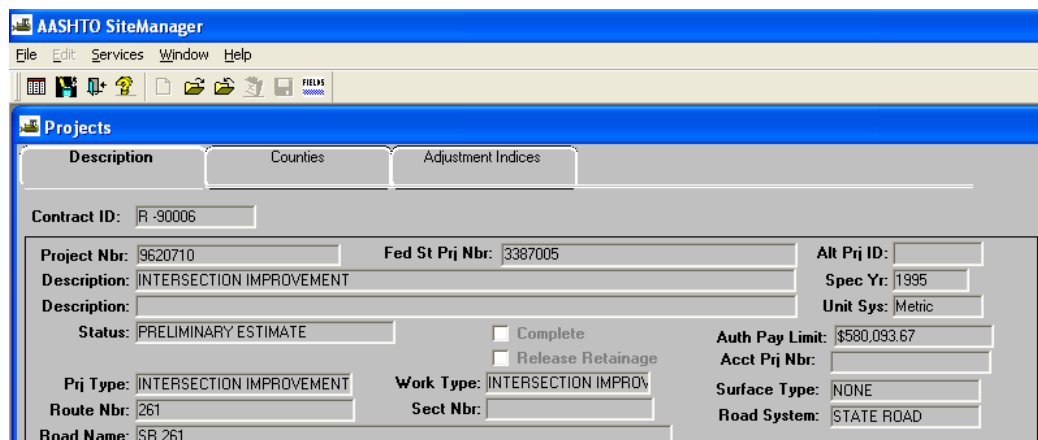
The bottom panel contains columns for:

- **Contract ID:** this is the identification number assigned to the contract.
- **Vendor ID:** this is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** this is the assigned Federal or State Project Number.
- **Status:** this field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** this field contains a letter and number code identifying the county where the majority of the work is located.
- **Lvl 2:** this column indicates the District office administering the contract.
- **Lvl 3:** this column is not utilized by INDOT.
- **Lvl 4:** this column is not utilized by INDOT.
- **Location Description 1:** this column is the description of the physical limits of the contract.

Use the Scroll or Find, Filter, Sort technique to locate the appropriate contract. “Double-click” on the **Contract ID**.



Use the Scroll or Find, Filter, Sort technique to locate the appropriate project.  
 “Double-click” on the project **PCN**.



There are three tabs located in the Projects window. They are as follows:

**Description:** The **Description** tab displays the Project description.

**Counties:** The **Counties** tab displays a list of Indiana counties and a list of those counties associated with the selected Project.

**Adjustment Indices:** The Adjustment Indices folder tab displays a list of available price adjustment indices and a list of those associated with the selected Project.

## Description Tab

**Description Tab:** The **Description** tab contains information describing the Project.

The screenshot shows the AASHTO SiteManager software interface. The 'Description' tab is selected. The form contains the following fields and values:

- Contract ID: R-90006
- Project Nbr: 9620710
- Fed St Prj Nbr: 3387005
- Alt Prj ID: (empty)
- Description: INTERSECTION IMPROVEMENT
- Spec Yr: 1995
- Unit Sys: Metric
- Status: PRELIMINARY ESTIMATE
- Complete: ☐
- Release Retainage: ☐
- Auth Pay Limit: \$580,093.67
- Acct Prj Nbr: (empty)
- Prj Type: INTERSECTION IMPROVEMENT
- Work Type: INTERSECTION IMPROV
- Surface Type: NONE
- Route Nbr: 261
- Sect Nbr: (empty)
- Road System: STATE ROAD
- Road Name: SR 261

**Contract ID:** **Contract ID** is a unique identifier and is automatically populated.

**Project Nbr:** **Project Number** is a unique identifier and is automatically populated.

**Fed St Prj Nbr:** **Federal/State Project Number** is a unique identifier and is automatically populated.

**Alt Prj ID:** Not utilized

**Description:** The first **Description** field is information describing the Project, and is automatically populated.

**Description:** The second **Description** field is for additional information describing the Project, and is automatically populated.

**Spec Yr:** the **Specification Year** indicates the specifications used for contract items and materials and is automatically populated

**Unit Sys:** The **Unit System** is the type of measurement System used to calculate quantities. The choices will be either English or metric. This is automatically populated.

**Status:** **Status** indicates the current status of a Project

Acceptance	District Office Review	Under Litigation
Active Construction	Finalized	
Claim	Preliminary Estimate	
Completed	Spaces	

**AASHTO SiteManager**

File Edit Services Window Help

**Projects**

Description Counties Adjustment Indices

Contract ID: R-90006

Project Nbr: 9620710 Fed St Prj Nbr: 3387005 Alt Prj ID:

Description: INTERSECTION IMPROVEMENT Spec Yr: 1995

Description: Unit Sys: Metric

Status: PRELIMINARY ESTIMATE ☐ Complete ☐ Release Retainage

Auth Pay Limit: \$580,093.67

Prj Type: INTERSECTION IMPROVEMENT Work Type: INTERSECTION IMPROV Acct Prj Nbr:

Route Nbr: 261 Sect Nbr: Surface Type: NONE

Road Name: SR 261 Road System: STATE ROAD

Location: WARRICK COUNTY - ON SR 261 AT OAK GROVE, CASEY ROAD Engr Pct: 10.0000

Location: AND PLANK ROAD (RP 001+015) Work Site: Rural - Old Coc

Beg Sta: 5+440.000 Beg Termini: 001+015 Latitude: 0

End Sta: 5+930.000 End Termini: Longitude: 0

**Complete:** Complete check box indicates whether the Project work is complete.

**Auth Pay Limit: Authorized Pay Limit** is used to determine if a voucher will be processed. If the total payments exceed this amount, the voucher will not be processed. Leaving this field blank indicates that no cap exists for total payments..

**Release Retainage:** When the **Release Retainage** check box is checked Retainage is automatically released when the Project is placed in completed status

**Acct Prj Nbr:** Is an accounting department-defined Project number. Currently not utilized by INDOT.

**Prj Type: Project Type** field identifies the type of construction that defines the Project and is automatically populated.

**Work Type: Work Type** identifies the major type of work being done in the Project and is automatically populated.

**Surface Type: Surface Type** field is the type of surface used in the Project and is automatically populated.

**Route Nbr:** Route number is the name of the route that the work is performed at and is automatically populated.

**Section Nbr: Section Number,**

**AASHTO SiteManager**

File Edit Services Window Help

**Projects**

Description Counties Adjustment Indices

Contract ID: R-90006

Project Nbr: 9620710 Fed St Prj Nbr: 3387005 Alt Prj ID:

Description: INTERSECTION IMPROVEMENT Spec Yr: 1995

Description: Unit Sys: Metric

Status: PRELIMINARY ESTIMATE ☐ Complete ☐ Release Retainage

Auth Pay Limit: \$580,093.67

Prj Type: INTERSECTION IMPROVEMENT Work Type: INTERSECTION IMPROV Acct Prj Nbr:

Route Nbr: 261 Sect Nbr:

Surface Type: NONE

Road Name: SR 261 Road System: STATE ROAD

Location: WARRICK COUNTY - ON SR 261 AT OAK GROVE, CASEY ROAD

Engr Pct: 10.0000

Location: AND PLANK ROAD (RP 001+015) Work Site: Rural - Old Coc

Beg Sta: 5+440.000 Beg Termini: 001+015 Latitude: 0

End Sta: 5+930.000 End Termini: Longitude: 0

**Road System:** identifies which system of Roadways the Project falls under, selected from the pull down menu;

- City
- County
- DNR Road
- Federal System
- Frontage
- Institution Road
- Interstate
- National Highway System
- Spaces
- Special
- State Road
- Toll Road
- US Highway

**Road Name:** Road Name is the text identifier of the project Roadway.

**Location:** Location is the description of where the project physically exist.

**Engr Pct: Engineering Percentage** is the Engineering construction percentage that represents the state cost (overhead) of managing a project.

**Location:** Location contains the reference post location.

**Work Site:** Work Site the federal designation for the type of route.

**Beg Sta: Beginning Station Number** the starting location for the project.



The screenshot shows the AASHTO SiteManager software interface. The main window is titled "Projects" and contains a form for entering project data. The form is organized into several sections with labels like "Contract ID", "Project Nbr", "Description", "Status", "Pri Type", "Route Nbr", "Road Name", "Location", "Beg Sta", "End Sta", "Fed St Prj Nbr", "Work Type", "Sect Nbr", "Auth Pay Limit", "Acct Prj Nbr", "Surface Type", "Road System", "Engr Pct", "Work Site", "Latitude", and "Longitude". The data entered in the form includes: Contract ID: R-90006, Project Nbr: 9620710, Fed St Prj Nbr: 3387005, Description: INTERSECTION IMPROVEMENT, Status: PRELIMINARY ESTIMATE, Pri Type: INTERSECTION IMPROVEMENT, Route Nbr: 261, Road Name: SR 261, Location: WARRICK COUNTY - ON SR 261 AT OAK GROVE, CASEY ROAD, Beg Sta: 5+440.000, End Sta: 5+930.000, Beg Termini: 001+015, Auth Pay Limit: \$580,093.67, Acct Prj Nbr: , Surface Type: NONE, Road System: STATE ROAD, Engr Pct: 10.0000, Work Site: Rural - Old Coc, Latitude: 0, and Longitude: 0.

**Beg Termini: Beginning Termini** is the beginning Reference Post (RP) number for the project.

**Latitude: Latitude** Geographic coordinate of the worksite

**End Sta: End Station Number** the ending location for the project.

**End Termini: End Termini** is the ending Reference Post (RP) number for the project.

**Longitude: Longitude** Geographic coordinate of the worksite

## Generic Fields

Any customization INDOT requires will be kept in a generic field.

AASHTO SiteManager

File Edit Services Window Help

Choose Keys Ctrl+Alt+K

Generic Fields Ctrl+Alt+G

Process Status

Contract ID: R-90006

Project Nbr: 9620710 Fed St Proj Nbr: 3387005 Alt Proj ID:

Description: INTERSECTION IMPROVEMENT Spec Yr: 1995

Description: Status: PRELIMINARY ESTIMATE Complete Release Retainage

Auth Pay Limit: \$580,093.67

Acct Proj Nbr:

Prj Type: INTERSECTION IMPROVEMENT Work Type: INTERSECTION IMPROV Surface Type: NONE

Route Nbr: 261 Sect Nbr: Road System: STATE ROAD

Road Name: SR 261 Engr Pct: 10.0000

Location: WARRICK COUNTY - ON SR 261 AT OAK GROVE, CASEY ROAD Work Site: Rural - Old Cox

Location: AND PLANK ROAD (RP 001+015)

Beg Sta: 5+440.000 Beg Termini: 001+015 Latitude: 0

End Sta: 5+930.000 End Termini: Longitude: 0

“Click” on **Services** located on the tool bar and select **Generic Fields**.

Object: 650 Generic String 1: Generic Date 1: 00/00/00

Location: 500 Generic String 2: Generic Date 2: 00/00/00

Cost Acct: 703 Generic String 3: Generic Date 3: 00/00/00

Fund: 400 Generic String 4: Generic Date 4: 00/00/00

Function: 94 Generic String 5: Generic Date 53: 00/00/00

PO Date: 03/28/05 Generic Code 1: Generic Date 5: 00/00/00

Approp: 850 Generic Code 2: Generic Date 52: 00/00/00

Generic String 52: Generic Indicator 1: Generic Date 54: 00/00/00

Generic Number 1: 0 Generic Indicator 2: Generic Date 55: 00/00/00

Generic Number 2: 0 Generic Indicator 3:

Generic Number 3: 0 Generic Indicator 4:

Generic Indicator 5:

**Object:** Object is defaulted to OBJ

**Location:** Location is defaulted to 500

**Cost Acct:** is defaulted to 703

**Fund:** Fund is defaulted to 400

**Function:** Function is last 2 numbers of ORGN

**P. O. Date:** P. O. Date is the Date the purchase order is issued.

**Approp:** Approp is first 3 numbers of APPR UNIT

## Counties Tab

**Counties Tab:** The **Counties** tab displays a list of Indiana counties and a list of those counties associated with the selected Project.

The screenshot shows the AASHTO SiteManager interface with the 'Counties' tab selected. The 'Contract ID' is R-90006. The 'Project Nbr' is 9620710 and the 'Fed State Project Nbr' is 3387005. The 'Description' is INTERSECTION IMPROVEMENT and the 'Location' is WARRICK COUNTY - ON SR 261 AT OAK GROVE, CASEY ROAD AND PLANK ROAD (RP 001+015). Below this, there are two tables: 'Available Counties' and 'Project County'. The 'Project County' table shows WARRICK with a 'Proj Len %' of 100.00. Navigation buttons include 'Add ->', 'Add All ->>', '<- Remove', and '<<- Rem All'.

Available Counties	Project County	Proj Len %
	WARRICK	100.00

## Adjustment Indices Tab

**Adjustment Indices:** The **Adjustment Indices** tab is not utilized by INDOT.

The screenshot shows the AASHTO SiteManager interface with the 'Adjustment Indices' tab selected. The 'Contract ID' is R-90006. The 'Project Nbr' is 9620710 and the 'Fed State Project Nbr' is 3387005. The 'Description' is INTERSECTION IMPROVEMENT and the 'Location' is WARRICK COUNTY - ON SR 261 AT OAK GROVE, CASEY ROAD AND PLANK ROAD (RP 001+015). Below this, there are two tables: 'Available Price Indices' and 'Project Pay Adjmnt Indices'. Navigation buttons include 'Add ->', 'Add All ->>', '<- Remove', and '<<- Rem All'.

Indx Type	Available Price Indices	Indx Type	Project Pay Adjmnt Indices
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## Viewing Projects

### A-2-3 Group Exercise

View the Project information on an active contract.

Log into SiteManager as: inquire

Password: pass

“Double-Click” on **Contract Administration (+)**

“Double-Click” on **Contract Records (+)**

“Double-Click” on **Projects**

“Double-Click” on **Contract R-90002**

“Double-Click” on **PCN 9620710**

View information on **Description Tab**

View information on **Counties Tab**

“Click” on the Close button located on the toolbar to exit.